MyPennMedicine
Pre-Check In Quick Start Guide
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**Introduction**

myPennMedicine Pre-Check In is a feature that allows patients to verify or request updates to their information such as; demographics, (address, race, ethnic background, preferred language, home number, work number, preferred number, & e-mail address), preferred pharmacies, medications, allergies, health issues, complete questionnaires (where applicable) and even sign certain consents electronically, up to 4 days prior to coming into their appointment within myPennMedicine.

**Adding the Pre-Check In Column to your DAR**

Follow these steps to add the Pre-Check In column to your personal DAR. Note: This column is already available by default on public DARS.

1. Open your DAR
2. Navigate to the Display tab
3. In the Available Columns window, select “UPHS eCheckin Action Taken” and click the right arrow to move it to your Selected Columns window
4. Press Save and Run the report
5. The column will now display on the activity toolbar as **PreCk Update**.

![Department Appointments Report: Melissa DAR](image)

6. If you hover over the response in the column, you will see 4-5 lines.

- The lines refer to the actions in MPM.
- Each will say Verified or Updated.
- The numbers shown are the IDs of the response in the list.
- When you edit or mark an item as correct, the corresponding line will show as Updated or Verified in the column.
- If patients decide to finish later, then only the lines that are updated or completed will show up on the column.
- The column will show as Updated or Verified depending on what the response is in the first line.
Adding the Pre-Check In (PreCk Update) Column to your Multi Provider Schedule (MPS)

Follow these steps to add the Pre-Check In column to your MPS, which is available by default on the department MPS. This column will allow clinical staff to review information provided by patients via the Pre-Check In processes on myPennMedicine. This column is only specific to Pre-Check In and will not show information available from Care Everywhere i.e. other healthcare institutions or pharmacies.

1. Open your personal MPS
   a. **NOTE:** You can only add columns to your personal MPS, not the Department MPS
2. Click on the gears to add the column to your MPS
3. Once you click on the gears, search for the “PreCk Update” in the Available Columns.
4. Click on “PreCk Update?” and then click the Add button to move it to your Selected Columns.
   a. Note: if providers would like to add an additional column that populates if there is also information available from Care Everywhere they can add the “Outside info?” column at this time as well.
5. You can move that column up or down in the toolbar by using the down and up arrows if you would like to.
   a. If you have also added the “Outside info?” column it may be helpful to place these columns near each other.
6. Once you have that column where you would like it, you can press Accept

**Viewing the Pre-Check In (PreCk Update) and Column on your MPS with examples**

This is how the new column will look on your MPS

1. If there is a list of statuses such as *Verified*, *Updated* or *Completed* in the “PreCk Update” column, this indicates that the patient completed Pre-Check In. By hovering over the list you will see the full drop down list of statuses.
   a. *Verified* indicates they reviewed current information in pennchart and made no changes
   b. *Updated* indicates they added new information or requested a change to existing info
c. *Completed* refers to certain steps in Pre-Check In such as signing a form or completing a clinical questionnaire.

2. By double clicking the patient icon you will be taken directly to the “Reconcile Outside Info” activity in the patient’s chart

3. The rows will appear in the order below and correspond to the actions taken in MPM

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5 (if applicable)</td>
<td>6 (if applicable)</td>
</tr>
<tr>
<td>Personal Info</td>
<td>Medications</td>
<td>Allergies</td>
<td>Health Issues</td>
<td>Sign Documents</td>
<td>Questionnaires</td>
</tr>
</tbody>
</table>

Example 1) The patient completed Pre-Check In and updated clinical information in addition to completing the outpatient general consent form and a clinical questionnaire

Example 2) No general consent or questionnaire was assigned or completed but clinical information was updated

Example 3) No outpatient general consent form was completed but clinical information was updated and a questionnaire was completed
Viewing Patient Updated Clinical information; Medications, Allergies and Health issues

Information provided by patients will display a patient icon with the word ‘patient’ appearing next to it under source. These requests for updates through myPennMedicine may be added, updated, or discarded in the ‘Reconcile Outside Info’ activity. (for more information on reconciliation please see Reconciler Functionality tip sheet or this brief tutorial video)

Medications: Example new medication reported (green) and removal of medication requested (red)
Allergies: New allergy reported (green)

Problems: removal requested (red)
Viewing updated Demographic information in PennChart

Updates that patients make to demographic information such as Address, Race, Ethnic background, preferred language, home number, work number, preferred number and e-mail address, will continue to file directly to Pennchart.

1. Staff can review prior registration information in the Registration history in PennChart. Information provided by the patient will appear as being completed by the user “pennmedicine,my”.

![Registration History Report](image)
Pathways to Run the Reg Audit Trail Report

There are two different pathways to get to the report. Follow the steps below to run the Reg Audit Trail Report.

1. To run the report from the EPIC button
   - EPIC button > Reports > Registration Reports > Reg Audit Trail Report

2. To run the report from the search window
   a. Navigate to the search bar at the top right of your screen (under the Log Out button)
   b. Type “Reg Audit”
      i. DO NOT PRESS ENTER OR TAB
   c. Click on “Reg Audit Trail Report” from the Jump to window
How to Run the Reg Audit Trail Report

The Reg Audit Trail Report is used to show changes that were made to a patient’s account including registration, guarantors, coverages and HARs. Follow the steps below to run the Reg Audit Trail Report.

1. Type the patient’s name or MRN number in to the Patients field
2. Select the time frame for which you want to search the patient’s chart for changes
3. Click Run

How to Read the Reg Audit Trail Report

The Reg Audit Trail Report can show a lot of information depending on the date range and other criteria that you input. The report is configured like an Excel spreadsheet. You can filter by each column header by clicking on the header portion.

1. The **Record Type Column** indicates which type of record the change occurred in.
   a. i.e. Patient record, Coverage records, Guarantor record. This column corresponds to the Criteria options that are available when running the report.
2. The **Record Column** indicates which record you are searching in
3. The **Item Column** indicates which item was changed
   a. i.e. Phone number, Address, Coverage
4. The **Old Value Column** indicates the value that was in the patient’s chart before a change was made
5. The **New Value Column** indicates what the old value was changed to
6. The **Date and Time Column** indicates when the end user made the change

The **User Column** indicates the end user who made the change

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**Viewing The signed annual consent form in PennChart**

The Signed outpatient annual consent form will be available in the media tab filed under the date it was completed by the Patient via Pre-Check In.